DRMS-I 5010.1

May 30, 2003

DEFENSE REUTILIZATION AND MARKETING SERVICE (DRMS)

TOTAL MAGIC CUSTOMER DATABASE

A. REFERENCES

1. One Book (DLAD 5025.30) Chapter on Customer Relationship Management.
2. DRMS Customer Intelligence Process.

B. PURPOSE: To identify responsibilities and procedures for using Total Magic as a means of improving and sharing customer knowledge.

C. APPLICABILITY AND SCOPE. Applies to DRMS organizations.

D. DEFINITIONS

1. Subject Matter Expert (SME): An individual assigned the role of providing expert guidance and information on a designated program, function, policy or initiative.
2. Service Managers: For purposes of this Instruction, Service Managers are individuals (including those with other position titles) assigned the role of customer advocate with responsibility for interacting with DRMS customers on a recurring basis.

E. RESPONSIBILITIES

1. Office of Corporate Planning (DRMS-J):

a. Develop plans for gathering customer intelligence, with input/coordination of HQ offices and Balanced Scorecard change agents/leaders.
b. Coordinate with focal points from DRMS-B, N and I to assess corporate priorities for customer communications, Service Managers' assignments regarding customer interactions, and customer surveys/questionnaires.
c. Coordinate with DRMS management the business rules to be applied in DRMS. Communicate business rules to DLIS to ensure DRMS requirements are met. Periodically review use of Magic and recommend changes to improve its effectiveness.
d. Serve as liaison with DLIS on DRMS issues regarding the Total Magic database to include reports and user requirements.
e. Develop and report to DRMS Command the metrics on use of Total Magic and subjects/issues reported.

2. DRMS Business Operations (DRMS-B):

a. Use Magic as a means of improving DRMS knowledge of external customers, as appropriate.

b. Communicate business needs/priorities to the designated corporate focal point for review and prioritizing of efforts to gather customer information.
c. When requesting information from or about customers, use the standard DRMS procedure (described separately) to identify why the information is needed, how it will be used, and how to report it.
d. Assign Policy Subject Matter Experts to serve as the DRMS authorities and advisors on DRMS policies and initiatives. The Policy SMEs may edit comments input by Service Managers or by Subject Matter Experts in N/I pertaining to their policy/initiative. Policy SMEs may also create standard resolutions (responses) on issues/questions that apply DRMS-wide.
e. Designate users who will access Total Magic to respond to incidents assigned to DRMS-B for resolution, and also review information input by Service Managers regarding DRMS policies, initiatives and customer issues.
f. Ensure DRMS-B program/initiative managers act on the information gained (e.g., initiate action to improve a system, refine a process, coordinate with other functional areas, or share information learned about customer needs). Report findings and resulting actions to DRMS Command and other offices, as appropriate.

3. DRMS National Command (N) and International Command (I):

a. Determine appropriate uses of Magic as a means of improving DRMS knowledge of external customers.
b. Assign Subject Matter Experts to serve as the N/I points of contact on DRMS programs that are deployed or operational. They may consult with the Policy SMEs in DRMS-B, as necessary, to ensure the correct information is provided.
c. Designate action officers who will routinely access Total Magic to look for incidents assigned to the DRMS SME group and further assign the incidents to Subject Matter Expert(s) in N/I for resolution.
d. Designate one or more users who will routinely access Total Magic to review information input by Service Managers regarding operational execution of DRMS programs or having broader implications, e.g., lessons learned, potential best practices, or issues that may pertain to other geographic areas or customers. (At N/I discretion, these users may be the same people designated as SMEs.)
e. Based on information obtained from Total Magic, ensure appropriate action is taken (e.g., action to resolve problems, improve execution, clarify expectations of field offices, publicize improved practices or lessons learned). Report issues and resulting actions to DRMS Command and other offices, as appropriate.
f. If there is a need to request information from customers, use the standard DRMS procedure (described separately) to identify why the information is needed, how it will be used, and how to report it.
g. Develop reports to periodically advise Zone Managers and DRMS-J on Service Managers' usage of Magic.

4. DRMS Zone Managers:

a. Support Service Managers' role as customer advocates and their use of Magic to report customer feedback.

5. DRMS Service Managers (SMs) or equivalent:

a. Report customer feedback that will communicate to others in DRMS the customers' business needs, satisfaction levels, suggestions, and other relevant feedback.
b. Input such information as "incidents" in Total Magic within three days after the customer interaction, unless circumstances prevent doing so.
c. Follow instructions in the Total Magic User Guide.
d. For assistance, contact the appropriate office. Phone numbers and e-mail addresses are in the User Guide.
    (1). For help regarding passwords, system access or navigation, contact the DLIS Help Desk.
    (2). For help on DRMS queries or reports, contact the DRMS-J Point of contact (POC).
    (3). For questions or clarification on the customer information required, contact the POC provided by DRMS National or International in their instructions regarding SM responsibilities.
e. Assist DRMS-HQ elements in determining appropriate uses of Magic as a means of increasing DRMS knowledge of external customers.

F. PROCEDURES

1. Office of Corporate Planning (DRMS-J) Point of Contact:

a. Update the DRMS Total Magic User Guide/Instructions as needed.
b. Assign to a designated SME any incident assigned to the DRMS SME group that is not promptly accepted by an Action Officer in DRMS-N/I.
c. Regularly check Magic to identify any incidents not resolved after they have been assigned to the DRMS SME group for response.
d. If an incident assigned to the DRMS SME group is not resolved, the incident will be escalated for follow-up action using these rules:
    (1). An e-mail notification is sent first to the person assigned the incident. If it is still not resolved within one workday following that notice, an e-mail notification will be sent to the appropriate HQ supervisor or designee.
    (2). Urgency ID "1" (High) incidents will be escalated as above if not resolved within one workday.
    (3). Urgency ID "2" (Medium) will be escalated if not resolved within two workdays.
    (4). Urgency ID "3" (Low) will be escalated if not resolved within three workdays.
    (5). Urgency ID "4" (None) will be escalated if not resolved within 14 workdays.
    (6). If an SME knows that resolution will exceed the above time frames, a Note added to the incident stating reason for the delay will stop it from being automatically escalated.
    (7). DRMS-J may escalate an incident if necessary.

2. Service Managers (SMs) or equivalent:

a. Enter "incidents" when the information has potential to improve knowledge of customers and customer needs, enhance decision-making, or otherwise provide value to DLA as a record of support to a specific customer.

b. Do not record in Magic the day-to-day contacts resulting from normal operations, unless the information will be useful to others in making business decisions or understanding customers. (Note: In addition to Magic inputs about customers, SMs have a responsibility to send Zone Managers reports on their work activities, which may then feed into Significant Activity Reports.)
c. When gathering information from customers in response to a direction from HQ, use the designated format in the resolution. If no specific format is provided, use the standard format attached.
d. If HQ action or assistance is needed to resolve an incident, assign the incident in Magic to the DRMS SME (Subject Matter Experts) group. To see the resolution or status of an incident assigned to HQ, run a query by incident number, or run a report of your incidents.
e. Create Notes in the incident report to add comments intended for internal DRMS/DLA information that are not part of the resolution (e.g., to show status of an incident or explain delays in responding). When a note is added, the incident will not be escalated to a higher level and no reminder will be sent to the next higher review level.
f. Check the block on the Magic screen to indicate the customer should NOT receive a copy of the response. (Until this block is checked as the system default, DRMS users must check this to prevent messages from being sent to customers.)
g. To advise other DRMS personnel (without Magic access) of a closed incident or resolution, copy the information into an e-mail message to them.

3. DRMS-B Subject Matter Experts (SMEs):

a. Use the standard DRMS procedure (described separately) when requesting information from or about customers, to identify why the information is needed, how it will be used, and how to report it.
b. Serve as the DRMS authorities and advisors on designated policies, programs or initiatives.
c. Respond promptly when Total Magic incidents are assigned to DRMS-B for resolution (see escalation rules in paragraph F.1 above).
d. When appropriate, create "standard resolutions" (responses) to issues/questions that apply DRMS-wide. Standard resolutions would be reused when responding to the same question in the future. To do so, create a standard description and standard resolution before saving it.
e. When a resolution input from N/I by a SME or Service Manager needs modification to improve its accuracy or completeness, correct the information by doing one of the following:

(1). Amend the original resolution by adding to it, and coordinate with the person who input the initial response.
(2). Notify the SM or SME of the correct wording and request he/she edit the resolution as indicated; or
(3). Create a standard description with a standard resolution, save it, and coordinate with the person who input the initial response.

f. Review information input into Magic by Service Managers regarding initiatives, policies, and customer issues pertaining to the business area.
g. Initiate appropriate action based on the information gained (e.g., initiate action to improve a system, refine a process, coordinate with other functional areas, or

exchange information learned about customer needs). Report findings and resulting actions to DRMS Command and other offices, as appropriate.

4. DRMS-N/I Action Officers and Subject Matter Experts (SMEs):

a. (Action Officers) Routinely access Total Magic to look for incidents assigned to the DRMS SME group, and further assign each incident to the SME in N/I for resolution.
b. Respond timely to the incidents assigned (see Urgency codes and escalation rules in Paragraph F.1. above).
c. Create Notes in the incident report to add comments intended for internal DRMS/DLA information that are not part of the resolution (e.g., to show status of an incident or explain delays in responding). When a note is added, the incident will not be escalated to a higher level and no reminder will be sent to the next higher review level.
e. Check the block on the Magic screen to indicate the customer should NOT receive a copy of the response. (Until this block is checked as the system default, DRMS users must check this to prevent messages from being sent to customers.)
f. When necessary, consult with the Policy SMEs in DRMS-B to ensure the correct information is provided.
g. Provide input and recommendations to DRMS-B regarding problem resolutions or suggested changes in policy/procedures.

5. Supervisors of SMEs:

a. When an incident is escalated, follow up to ensure it is properly resolved and closed.

G. EFFECTIVE DATE AND IMPLEMENTATION. This instruction is effective and will be implemented upon distribution.

H. INFORMATION REQUIREMENTS.

1. To request information from or about customers, use the format designated for that purpose.
2. To report customer feedback, use the standard format shown in the Attachment.
3. For other reports provided by DRMS-B, I, N, or J as described above, use the reporting format appropriate for the situation.

BY ORDER OF THE COMMANDER

/s/
JANINE DES VOIGNES
EXECUTIVE ASSISTANT

1 Attachment

ATTACHMENT: Standard Format for Customer Feedback

Use the following format to enter an incident resolution, unless more specific instructions are provided. Include the checked items and other items relevant to the situation.

	Information gained from customer (as requested):
	Feature(s) that please the customer (be specific):
	Feature(s) that create problems or complaints (be specific on what needs fixing):
	Reason(s) for using (or not using) ___________________ services or systems:
	Information provided to the customer (briefing, training conducted, etc.):
X	Other valuable information for DRMS (additional customer comments, a unique solution, lesson learned, leads on potential customers, unmet disposal needs):
X	If applicable, identify any customer question or issue requiring HQ assistance: (Assign the incident to DRMS SME Group.)